



# FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:  
Request for  
New Vendor

DATE DEVELOPED: 07/27/2021

REVISED DATE:

**SUBJECT: Request for New Vendor**

## Request for New Vendor

The Request for New Vendor entry point gives district personnel outside the Purchasing Department the ability to search the Frontline ERP database to check if a company is established as a vendor for the district. If the search does not locate a vendor, the user can submit a request to the Purchasing Department that the vendor be approved and added to the system.

### Vendor Search

Use the Request for New Vendor entry point to search the Frontline ERP database to see if a company has been previously established as a vendor for the district. If your search does not locate the vendor, you can submit a request for a new vendor that will be reviewed by the Purchasing Department for approval.

#### Searching for Vendors

- Access the Request for New Vendor entry point to view the Search tab.

A screenshot of the Frontline ERP search interface. At the top, there are three tabs: 'Search', 'Search Results', and 'Details'. Below the tabs is a 'Search Criteria' section. It includes a 'Vendor Name:' label followed by an empty text input field. Below the input field are two radio buttons: 'Exact' (unselected) and 'Contains' (selected). At the bottom of the search criteria section, there are two buttons: a blue 'Search' button with a magnifying glass icon, which is highlighted with a red rectangular box, and a blue 'Clear' button with a trash can icon.



# FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:  
Request for  
New Vendor

DATE DEVELOPED: 07/27/2021

REVISED DATE:

**SUBJECT: Request for New Vendor**

- Enter the Vendor Name.
  - With a *Contains* search, your search results will include any vendor with a name that contains the characters you enter in the field. For example, if you enter "off", your search might return Office Depot, City Office Supplies, and Bob's Coffee Service. With an *Exact* search, your search will only return a vendor with a name that matches your complete entry exactly.
- Click the Search button to view the Search Results tab with any matching results.

Search Results Details

Select a row in the search results table to view its details.

Official Name: Requisitioning Categories:  
Vendor: Status:  
Remit To Name and Address:  
Account Representative:  
Order From Name and Address:

Search Results Based on : Active Type "Both", Vendor Name Contains "bsn"

Vendor ID	Official Name	Approval Status	Inactive ?
461330	VARSIITY BRANDS HOLDING CO., INC	Approved	

C - Searched value contained in Company  
V - Searched value contained in Vendor  
R - Searched value contained in Remit To  
A - Searched value contained in Account Representative  
O - Searched value contained in Order From

View Detail Create Request For New Vendor

## Working With Search Results

The Search Results tab shows a listing of vendors that matched your criteria. The codes next to each search result indicate which information in the vendor record matched your search. The codes are:

- C: Searched value contained in Company
- V: Searched value contained in Vendor



# FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:  
Request for  
New Vendor

DATE DEVELOPED: 07/27/2021

REVISED DATE:

**SUBJECT: Request for New Vendor**

- R: Searched value contained in Remit To
- A: Search value contained in Account Representative
- O: Search value contained in Order From

## Reviewing High-Level Information

To review information about a company, click on vendor name in the Vendor Profile Search Results. Information appears in the Search Results Details panel.

The screenshot shows a web interface with tabs for Search, Search Results, and Details. The Search Results tab is active, displaying a table with one record. The record details are expanded to show the following information:

- Official Name:** VARSITY BRANDS HOLDING CO., INC
- Requisitioning Categories:** ATH - Athletic Supplies
- Vendor:** BSN SPORTS INC/NAT CHEER ASSOC(461330)
- Status:** Approved
- Remit To Name and Address:** BSN SPORTS LLC ; P O BOX 841393, DALLAS, TX 75284-1393 ; (972) 930 - 9730
- Account Representative:** BSN SPORTS INC/NAT CHEER ASSOC : 640
- Order From Name and Address:** SHILOH ROAD BLDG 2 STE 200, PLANO, TX 75074 :

Search Results Based on : Active Type "Both", Vendor Name Contains "bsn"

Vendor ID	Official Name	Approval Status	Inactive ?
461330	R,O VARSITY BRANDS HOLDING CO., INC	Approved	

Search Results tab with details for a selected company

If the Search Results Details panel contains a **+** icon next to any of the information, the company has multiple contacts saved in the record (for example, multiple Order From contacts). Hover your cursor over the **+** icon to view a pop-up box with additional information.

## Reviewing Vendor Details

To review more comprehensive information for a company, click it and click the

[View Detail](#) button to view the Details tab.



# FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:  
Request for  
New Vendor

DATE DEVELOPED: 07/27/2021

REVISED DATE:

**SUBJECT: Request for New Vendor**

Search Search Results Details

### Company Profile Details

ID:	461330	Active Employee:	N
Official Name:	VARSITY BRANDS HOLDING CO., INC	HUB:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Short Name:	VARSITY BRANDS HOLDI	Payment Net Days:	30
Web Site:		Payment Terms:	NET30
Business Processes to Which the Company is Available:	Accounts Payable Check Request	Can Consolidate Invoices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Exempt from Backup Withholding:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Has Electronic Catalog:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Subject to 1099-MISC:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Minimum Check Amount (\$):	0.00
W-9 Status:		Maximum Payable Without PO (\$):	0.00
W-9 Receipt Date:	08-10-2021	Shipping Options:	
W-9 Federal Tax Classification:		Created:	By Sysadmin, Default at 2020-12-07 02:00:00
		Modified:	By Sysadmin, Default at

[Return to Search Results](#) [Create Request For New Company](#)

If you have thoroughly searched the database and reviewed company information and did not locate the company, you can click the [Create Request For New Company](#) button to create a request that your Purchasing Department add to company as an approved district vendor. See Requesting New Vendors.

## Requesting New Vendors

In the Request for New Vendor entry point, if you did not locate the vendor for which you were searching, you can submit a request for your Purchasing Department to approve the vendor.

It is recommended that you search the database to be sure the vendor is not already established in the system. See Searching for Existing Vendors.

- On either the Search Results tab or the Details tab, click the

[Create Request for New Vendor](#) button to view the Request for New Vendor tab.



# FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:  
Request for  
New Vendor

DATE DEVELOPED: 07/27/2021

REVISED DATE:

**SUBJECT: Request for New Vendor**

New vendor requests may be submitted for approval by completing this screen

Vendor ID:

Vendor Official Name:

Vendor Short Name:

Business Processes to Which the Vendor is Available:  Purchase Order  Check Request

Justification:

**Contact Information**

First Name:

Last Name:

Middle Name:

Generation:

Email:

Phone:  -  -  ext

Fax:  -  -  ext

Country:

Zip:  -

Address Line 1:

Address Line 2:

City:

State:

Website:

1099/W-9 Information

Order From Information

The system will generate the Vendor ID when you submit your request.

## ENTER ALL INFORMATION IN CAPITAL LETTERS

- In the Vendor Official Name field, enter the complete name of the vendor.
- By default, the Vendor Short Name shows your entry from the Vendor Official Name field, but you can modify the vendor short name as necessary.
- Select the Business Processes to Which the vendor is Available.
- Enter the Justification for the vendor's approval.
- Enter the name and contact information for the vendor's contact person.
- If you have completed the basic information required for your request, click the  button. The Attachments tab of Maintain Vendor Profiles appears with a message stating that your request has been submitted for approval. You must attach a W-9 under the attachments tab.



# FRONTLINE PROCEDURES

Pasadena ISD


ENTRY POINT:  
Request for  
New Vendor

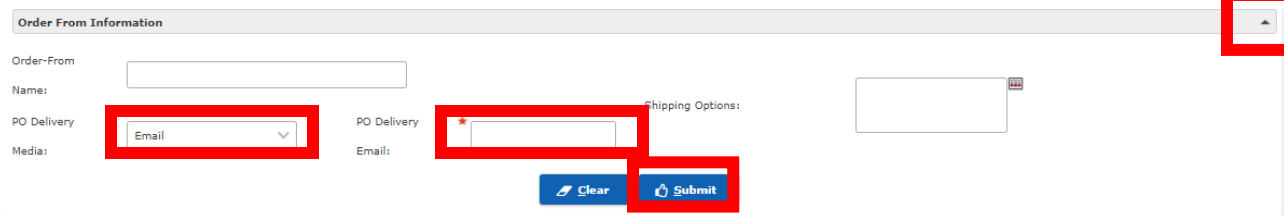
DATE DEVELOPED: 07/27/2021

REVISED DATE:

SUBJECT: Request for New Vendor

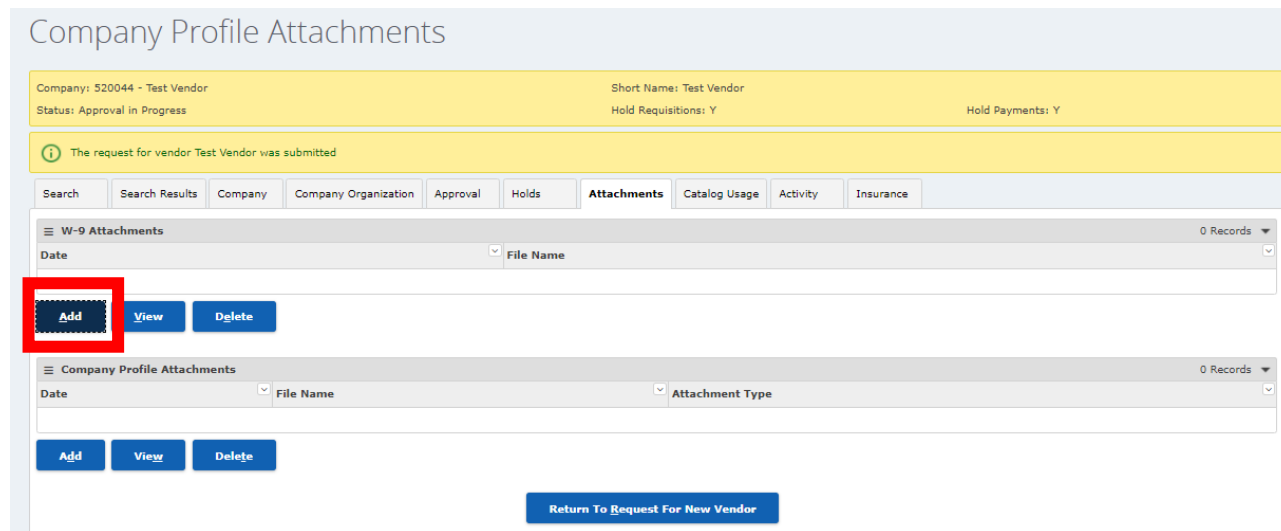
## Order From Information

- Click the  icon to open the order from screen


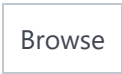


- PO Delivery is always Email
- Enter email of where to send PO
- Click Submit

## Company Profile Attachments



## Attaching a File for a W-9

- In the W-9 Attachments panel, click the  button to view the W-9 Attachment box.
- Click the  button to open a standard Choose File box.



# FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:  
Request for  
New Vendor

DATE DEVELOPED: 07/27/2021

REVISED DATE:

**SUBJECT: Request for New Vendor**

- Navigate to the location of the file and select the file for W-9. The file name is displayed in the W-9 File field.
- Click the  button to add the file to the W-9 panel.

## Viewing an Attachment

In either the W-9 Attachments or Company Profile Attachments panel, click the attachment, then click the  button to view the attachment in a file viewer browser window.

When you are finished viewing the attachment, click the X in the file viewer browser window to close it and return to the Attachments tab.

## Deleting Attachments

In either the W-9 Attachments or Company Profile Attachments panels, click the attachment to select it, then click the  button. Click the  button on the confirmation box to delete the attachment.